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Composer Help

IPD Planning & Preparation

This topic discusses preparation and planning for creating an **interaction process diagram (IPD)** that will process multimedia interactions. An IPD for voice interactions contains only a single workflow block. When planning an IPD for multimedia processing, start by considering the basic stages in the interaction life-cycle. You can then design an IPD that encompasses all stages, just one stage, or multiple stages. This topic presents four basic stages, which are especially applicable to e-mail processing, but could apply to other media types as well. The stages are:

1. Pre-Route
2. Route-to-Agent
3. Review
4. Pre-Send

Each stage is summarized below. **Pre-Routing Stage** The main activities in the pre-routing stage of e-mail handling can potentially include:

- Determining whether an e-mail has already been processed by Genesys. This can be accomplished via the absence or presence of an Interaction Subtype Business Attribute assigned by Interaction Server.
- Classifying e-mails based on content analysis, which can assign a category code. Once a category code is assigned to an e-mail, you can configure other types of processing to occur based on the category code.
- Screening e-mails for certain words or patterns of words. Once a screening rule match occurs, you can configure other types of processing based on the match.
- Sending an acknowledgement and/or automatic standard response to the customer originating the e-mail.
- Determining the agent (if any) who previously handled the interactions related to this service.

Route-to-Target Stage This may or may not be an agent target. For example, the e-mail may be:

- Sent to a queue for submittal to other routing strategies and further processing.
- Sent to a queue for failed interactions.
- Forwarded outside the contact center to an expert with the expectation of getting a response back.
- Redirected to another agent without the expectation of getting a response back.
- Routed to an agent target for construction of a response.

Review Stage The reviewer could be a manager, supervisor, or QA Person. You may want to have two different types of quality assurance review:

- A supervisor review that checks the skills of the agent who constructed the response.
- An analysis that performs a sanity check; for example, to prevent sending out a bank account password in an interaction or to screen interactions for inappropriate language.

Pre-Send Stage The cycle of going from queue to routing workflow to queue can continue until the interaction reaches some final outbound queue. The pre-send stage performs last-minute quality checking and allows for attaching additional information to interactions when needed.

IPD Preparation

This section summarizes the preparatory steps for creating an IPD prior to actually creating, configuring, and placing blocks in Composer. It also describes the Configuration Database and Universal Contact Server Database objects that must exist first so they can be selected from Composer blocks.

1. Determine the interaction life cycle at your contact center.
2. Determine the media server, which will be referenced by the **Media Server block**. Check that the required **Endpoints** have been defined.
3. Determine which Composer blocks will be used in routing **workflows** reference by the **Workflow block** to perform the various processing required at each stage of interaction processing as described in the IPD Planning topic.
4. For each interaction processing stage, assign a name to the required IPD.
5. If you plan on having multiple IPDs **linked via workflows**, name the queues that will connect the workflows contained within each IPD.
6. Determine the selection criteria for extracting interactions from queues (**Views property** in the **Interaction Queue block**). For example, you may wish to extract certain interaction types earlier than other interaction types.
7. Create the required Knowledge Manager objects, such as categories and standard responses. For more information, see the *eService/Multimedia 8.0 Knowledge Manager Help*.
8. Create the required Configuration Manager/Genesys Administrator objects, such as media server Applications, Skills, Persons, Agent Groups, Places, Place Groups, and Business Attributes, just to mention a few. For more information, see the *Framework 8.1 Configuration Manager Help*.
9. Optionally, map Context Services attributes to Configuration Server Business Attributes. Once this is done, you can select a Business Attribute DB ID for a value in many **Context Services** block fields.
10. Create the routing workflow(s) that will perform the specialized processing tasks, which will be referenced by Workflow block(s).